

Licensee Maintenance – Add Special Order Supplier(s) as Authorized Vendor(s) Quick Reference Guide

Introduction

A licensee can manage customer profile data in the Licensee Online Order Portal (LOOP). Some of the data is restricted and can only be managed based on the role assigned.

Key Functions

This training session will focus on adding an authorized vendor for purposes of having Special Orders (SOs) placed for licensees to approve in LOOP.

LOOP Role Matrix Reference Guide

This matrix displays the functions and associated roles (those highlighted are covered in this training).

LOOP Function	Licensee Administrator	Licensee Approver	Licensee Buyer *
View/Edit Profile	X	X	X
Update Account Information	X		
Delete Members	X		
Manage Contacts/Members	X		
Add/Delete Payment Methods	X		
Add/Delete Authorized Vendors	X		
Add/Delete Authorized Agents	X		
Submit Orders	X	X	X
Approve Orders	X	X	
Approve Special Orders	X	X	
Create Purchase Lists	X	X	X
Delete Purchase Lists	X	X	X
Manage Purchase Lists	X	X	X
View Placed Orders	X	X	X
View Order Details	X	X	X
Copy to Cart Function	X	X	X
Cancel Approved Orders **	X	X	
Create Return Requests	X	X	X
View Return Orders	X	X	X
View Return Order Details	X	X	X

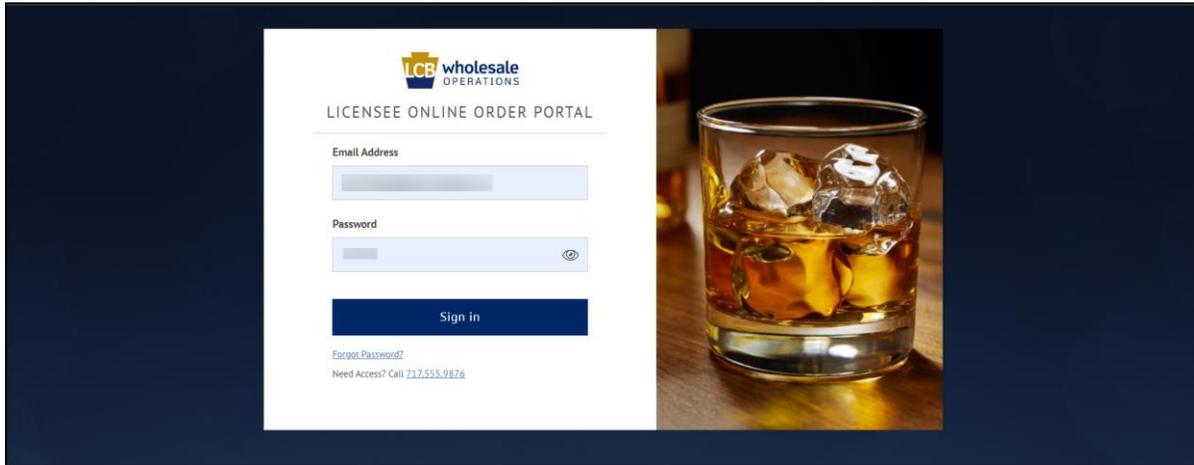
Notes: An asterisk (*) indicates this role is assigned to all users by default.

A double asterisk (**) indicates approved orders can only be canceled in LOOP prior to order cutoff or selection.

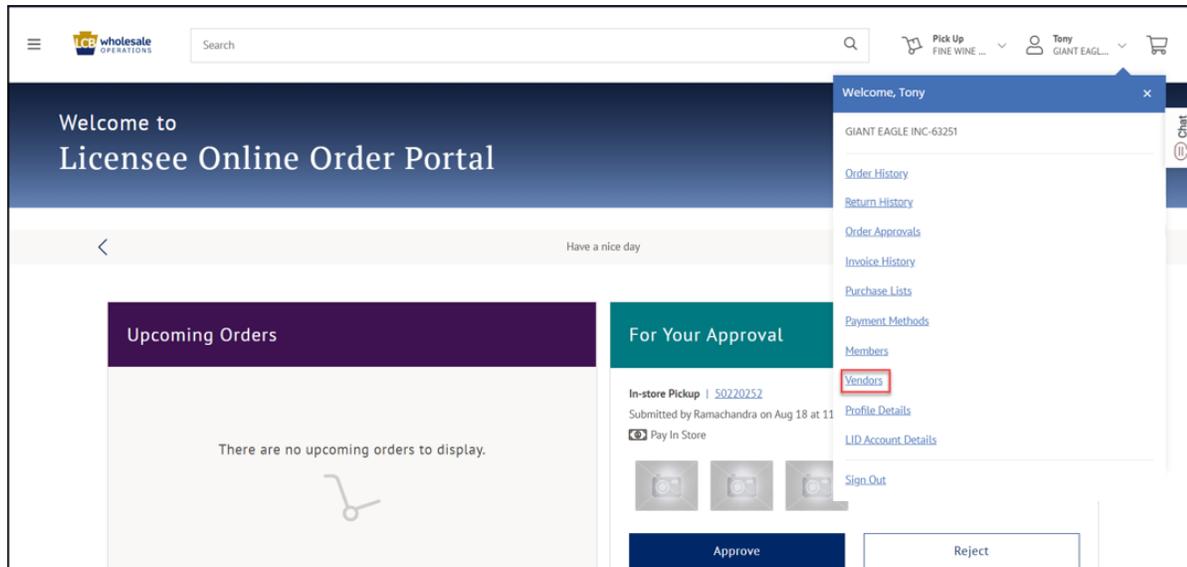
Add an Authorized Vendor (LOOP)

Link to eLearning video: [Licensee Maintenance – Add Special Order Supplier\(s\) as Authorized Vendor\(s\)](#)

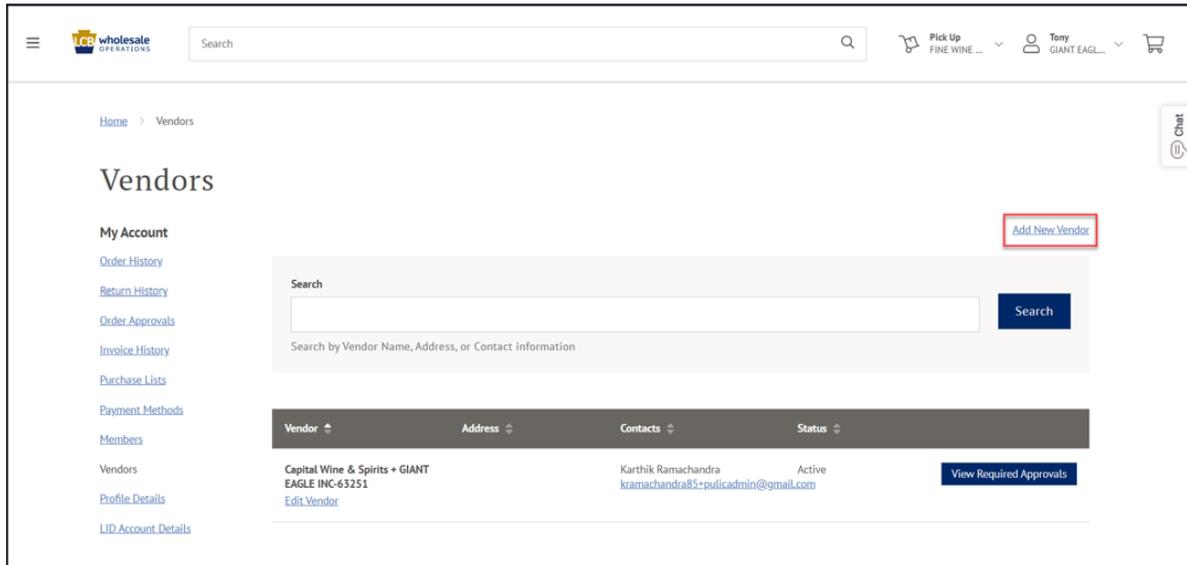
1. Navigate to LOOP, then **Sign In**.



2. Select **Vendors** from the dropdown menu next to the Shopping Cart.

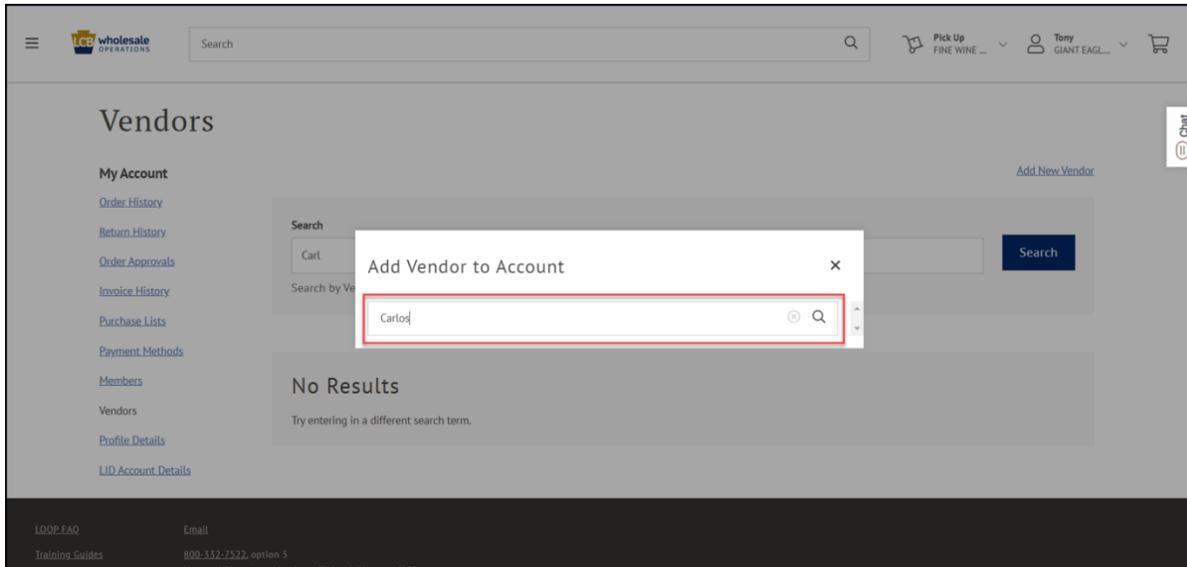


3. Click **Add New Vendor**.



4. Enter [Vendor Name], [Email Address] or [Contact information] in the Search Bar, then click **Search**.

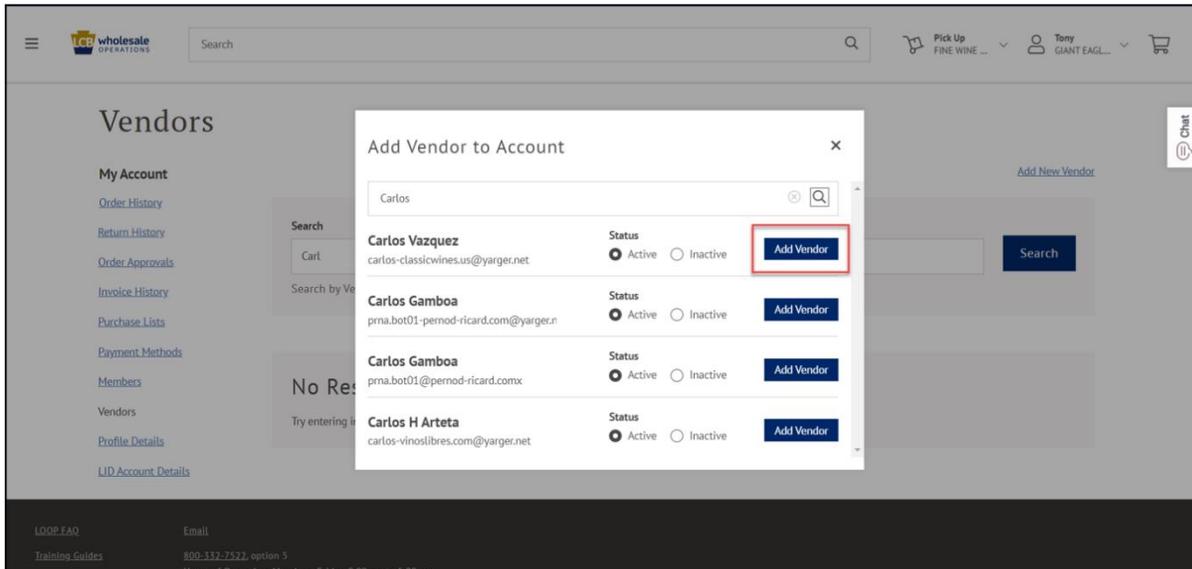
Note: Licensees can search by any portion of the first name, last name or email address.



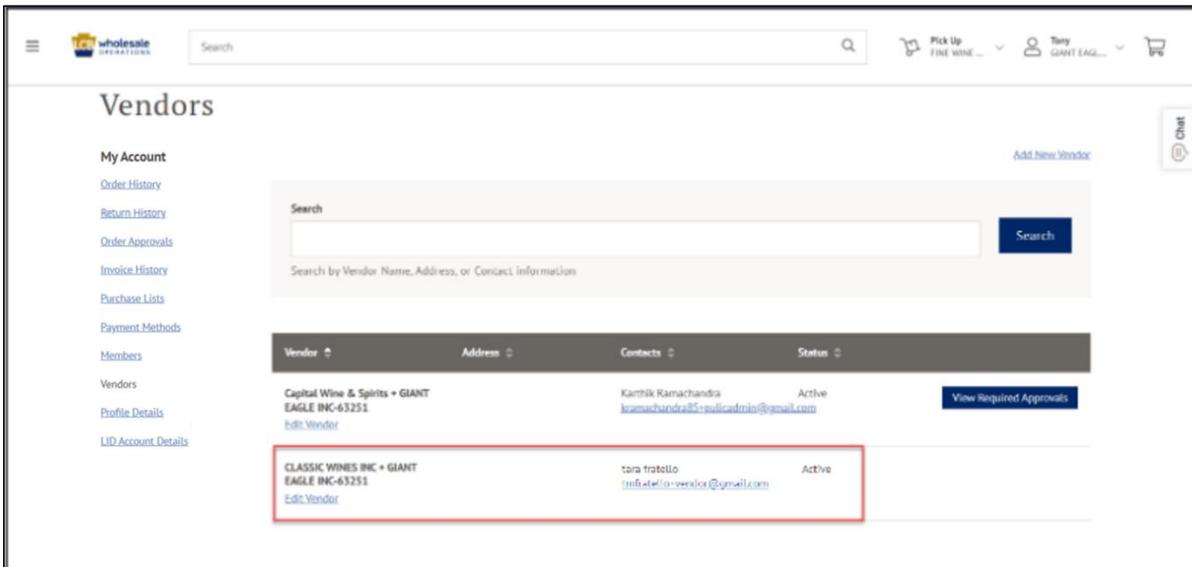
Note: This functionality allows the licensee to designate the vendor representative(s) that may access LOOP to create and manage Special Orders (SO) for the specified License Identification Number (LID).

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5. Choose the correct vendor, then click **Add Vendor**.

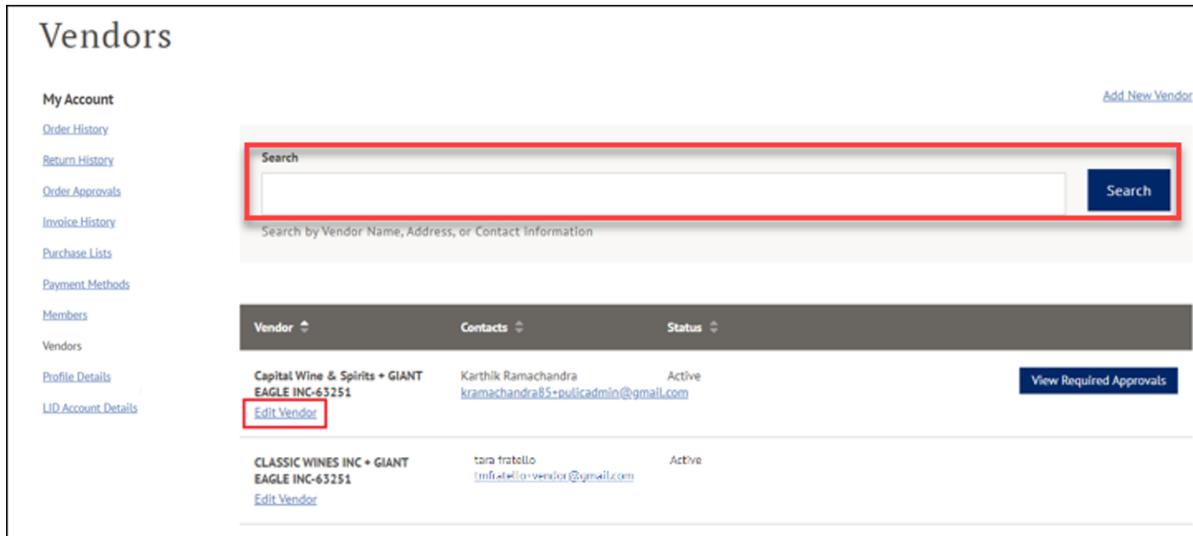


The added vendor will show up in the list of vendors.



Edit an Authorized Vendor (LOOP)

1. Click **Edit Vendor**.



Note: You can also search for a vendor if you do not see them in the populated list.

2. Click the appropriate **Status Radio Button**, then click **Update vendor**.

